

# Trinity School

## Financial Assistance Policy



### **DOCUMENT REVIEW**

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COMMITTEE RESPONSIBLE: Resources Committee

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## Table of Contents

POLICY AIM.....	3
FUNDING.....	3
LIMITATIONS.....	3
RESTRICTIONS.....	3
CRITERIA.....	3
FINANCIAL ELIGIBILITY.....	4
THE PANEL.....	4
CONFIDENTIAL.....	5
TRINITY FINANCIAL ASSISTANCE.....	5
CONTRACTUAL AGREEMENT.....	5
CONFIDENTIAL.....	6
TRINITY FINANCIAL ASSISTANCE CONTRACTUAL AGREEMENT.....	6



## Policy Aim

Trinity School recognises that there are families that may need financial support during their child's education e.g. trips, school uniform, equipment, books, etc. The aim of this policy is to set out fair, equitable and objective criteria for approving applications for Financial Assistance therefore ensuring affordability for all.

Any student/parent/carer can apply for general assistance. The fund is to help the most vulnerable with their education.

## Funding

Initially the Financial Assistance Policy will be funded by using retrospective gift aid claims. Thereafter, we will aim to allocate 10% (tithe) of all parent donations received from Sept'19 onwards.

## Limitations

Because there are only limited funds, we have to ensure that grants reach those most in need of support. Therefore, the more information provided regarding circumstances, whether they are long standing or short term, could help decide how the funds be more suitably distributed.

Requests for financial assistance are limited to:

- The student being on roll and at the time of incurring the benefit and payment
- The students' attendance is over 80%
- An academic or pastoral need
- The Headmaster will determine contributions on a case by case basis in conjunction with the panel.
- Funds being available

## Restrictions

The following restrictions apply:

- All other avenues for funding have been explored and exhausted
- Parent/carers are not to be in debt to the school
- This policy does not apply to travel on the buses/coaches paid for by parents/carers
- Trips or activities that are not of a curriculum nature i.e. ski trip and the application is made before committing to the trip and paying the deposit.

## Criteria

The criteria for the award being allocated are as follows:

- Commitment to study in the classroom
- Attendance to all lessons and registration
- Exemplary behavior
- Headmaster's discretion
- A form is completed by all applicants and submitted with supporting documents as requested to validate the claim.

Applications will be assessed on a case-by case basis.



The financial assistance application form (appendix A) needs to be completed by parent/carers wishing to apply for support.

The school will be looking for parents/carers to contribute in some way to each case where support is requested.

### Financial Eligibility

Only those who have a household income that is sufficiently low enough to be in receipt of the following will be able to apply, unless there is a reason for unexpected short-term financial hardship that should be detailed in a letter to the Headmaster.

- Income Support
- Tax Credits
- Universal Credit
- Disability Living Allowance
- Job Seekers Allowance
- Guaranteed Pension Credits

Evidence of such benefits/income will be required in order to claim. The 'household' income will include all adults living within the dwelling and must be the legal address for the student as per the school's records on its SIMs database system.

### The Panel

Depending on the reason for the application, the three panel members will be drawn from:

- Headmaster
- School Business Manager
- Finance Manager
- Finance Officer
- Department Lead for Pastoral
- SENCO Lead

In exceptional circumstances of an appeal against a decision regarding a claim for financial assistance, this would follow the School's Complaints Policy and procedures.

### Reporting

An annual report showing spend will be submitted to Resources (including Finance) Committee but no student/parent data will be provided.





For Office Use

Academic Year 2019-20

**Confidential**  
**Trinity Financial Assistance**  
**Contractual Agreement**

**Declaration & GDPR**

I accept that it is my responsibility to notify the school immediately of any change in our financial or living circumstances which may result in us no longer being eligible for support. I understand that to make a false claim will result in the funds being claimed back by the school.

By signing this form, you are agreeing to the school using the above data to assess your application and if successful make payments to you. This form and associated paperwork will be shredded three years after your child leaves the school. If you have any concerns regarding this, please do advise Mrs Partridge, School Business Manager.

Signed (parent).....

Date.....

Signed (student).....

Date.....

Name (please print) .....

Signature ..... Date .....

**For Office Use Only:**

Form Checked by ..... Support Granted £ ..... Date Approved: .....

Approved by ..... Title .....

Journal to Nominal Account ..... Date entered on Sage .....